

Chapter 13 - Quick Reference

Probate Quick Reference Guide

The Probate quick reference guide will give information about the following screens:

~Header Screen~

This screen is used to record information about the decedent or individual that the case is for.

~Party Screen~

This screen is used to record information about the parties associated with the case.

~Schedule Screen~

This screen is used to record information about the activities which occur in connection with this case.

~Summary Screen~

This screen summarizes the header, party and schedule screen for the case.

Probate Transaction Request Screen

The transaction request screen is the main menu for the JIS probate court system. It allows you to access the screens you will use to enter data or inquire on data already in the system.

USER: P44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

Probate Transactions	Receivable Transactions	Vendor Transactions
HDR - Case Header	ARM - Master Inquire	APD - Other Vendor Maint.
PTY - Party	ARU - Master Maintenance	APA - Attny Vendor Maint.
SCH - Schedule	CHK - Master Payment Inq	APF - Facil Vendor Maint.
SUM - Summary	LUP - Receipt Inquiry/Void	APV - Voucher Processing
MED - Mediation	ARP - Receive Payments	API - Voucher Inquiry
FRD - Financial Order	ADJ - Adjustment	APP - Voucher Payments
DOC - Documents	CRM - Credit Memo	APJ - Voucher Adjustments

Reports	Adoption Transactions	Accounting Transactions
RPT/PRO - Probate	ADC - Adoption Case Header	ACT - Account Maintenance
RPT/FIN - Financial	ADP - Adoption Party	BMT - Budget Maintenance
RPT/ADP - Adoption	ADE - Adoption Event	BIQ - Budget Inquiry
	ADS - Adoption Case Summary	PRM - Price File Maint.
	ADF - Adoption Forms	Other Options
		REL - Release Information
		CNI - Central Name Index
		CPI - Cir/Pro Name Index
		CCL - Central Calendar

NXT TRAN **A** **B** TYPE **C** CASE NBR **D** REC NBR **E**

F3=Exit F5=Setup F6=System Commands F8=Juvenile F9=Name Lookup

F10=Name Update F14=Docket Request F16=Inv/Date F20=File Maintenance Help

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A - Next Tran - The Next Tran field is used to access the probate and civil system. There are two valid codes:

P = Probate
C = Civil

B - Next Tran - The second field is used to tell the system where you want to go. All of the codes listed on the Transaction Request Screen are valid codes.

C - Type - This field is used to tell the system what you want to do. The following are valid options.

ADD = Add MOD = Modify DEL = Delete INQ = Inquiry

D - Case Nbr - This field is used to tell the system what case number to work with.

E - Record Nbr - This field is used for two different screens. When modifying an event, enter the event number into this field. When modifying or inquiring on a particular party, enter the party number into this field.

Probate Header Screen

The case screen holds information about the juvenile.

The screenshot shows a window titled 'B' with a header 'HEADER ADD'. Below this, various fields are displayed with their corresponding codes in brackets. The fields are: CASE# (03334823), TYPE (A), XREF # (B), TYPE (B), JUDGE, DATE, NAME, SSNO, OPTIONAL DATE (C), ADDRESS, CITY, STATE, ZIP, PHONE, STATUS (D), CLOSED (D), REOPEN (E), ATTN, PUBLIC (F), MICRO, DISPO (G), CODE (G), ORIG PR (H), CSE TYPE CHG (I), FROM TYPE (L), CHG VENUE (J), RACE, and ANCILLARY (K). A separator line follows. At the bottom, there are navigation options: NXT TRAN (P), HDR TYPE (ADD), CASE NBR (03334823), REC NBR, F2=Nxt Tran, F3=Exit, F4=Prompt, F6=System, F8=Juvenile, F9=Name Lookup, F13=Notes, F14=Dockets, F16=Inv/Date, and a Help button. The status bar at the bottom shows '07/009' and 'Connected to remote server/host OSMSOUTH using port 23'.

- A - Case Type -** Press <F4> for a list of valid codes or refer to Table 8.
- B - XRef and Type-** This is used to cross reference another case, enter the case number and type.
- C - Optional Date -** Enter the dob for a minor or the date of death for a deceased estate.
- D - Status and Closed -** Enter the status of this case O = Open, C = Closed, A = Administrative Closed.
- E - Reopen -** Enter the date the case was reopened. The status must be "O" when reopening.
- F - Public -** Enter the public status for this case. Press <F4> for a list of valid types.
- G - Dispo and Code -** Enter the dispo date and code for this case. Press <F4> for a list of codes.
- H - Orig PR -** Displayed is the original PR date and party number.
- I - Case Type Change -** Enter the date that you changed the case type and the former case type code.
- J - Change Venue -** Enter the date you received the change venue case.
- K - Ancillary -** Enter an "X" if this case is ancillary to the circuit court.

Probate Party Screen

The party screen is used to hold information about the parties.

PARTY ADD

CASE# 00895019 TYPE GA XREF # TYPE JUDGE 25275 DATE 1/01/2002
 NAME SOCIAL SECURITY, SSNO 333445555 OPTIONAL DATE
 STATUS 0 CLOSED REOPEN ATTNY PUBLIC P
 MICRO DISPO CODE ORIG PR

3 DESC A QUALIFICATION KEY B DATE DUE DATE C
 PARTY ACTIVITY KEY D DATE
 COURT ACTIVITY KEY E DATE
 GDNSHIP REVIEW TYPE F DATE

EVENT COMMENT MICRO#
 INVENTORY AMT FEE CALC DT G
 DATE PAID H RECEIPT #

NAME
 ADDRESS
 CITY ST ZIP
 PHONE
 ATTNY SURETY

NXT TRAN P PTY TYPE ADD CASE NBR 00895019 REC NBR
 F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup
 F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts

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- A - Description - Prompt <F4> for a list of valid party descriptions.
- B - Qualification Key- Enter the type of qualification. The valid codes are AOT - Acceptance of Trust and BND - Bond.
- C - Due Date - Enter the date that actions are due if different than the qualification date.
- D - Party Activity - Prompt <F4> for a list of party actions.
- E - Court Activity - Prompt <F4> for a list of court actions.
- F - Guardian Review - Prompt <F4> for a list of review codes.
- G - Calc Date - Enter the date the Inventory Fee was calculated.
- H - Paid Date - Enter the date the Inventory Fee was paid.

Probate Schedule Screen

The schedule screen is used to add information about the case.

SCHEDULE ADD

CASE# 00895019 TYPE GA XREF # TYPE JUDGE 25275 DATE 1/01/2002
 NAME SOCIAL SECURITY, SSNO 333445555 OPTIONAL DATE
 STATUS 0 CLOSED REOPEN ATTN PUBLIC P
 MICRO DISPO CODE ORIG PR

NUM	CODE	F/DATE	PTY	SEQ	H/DATE	TIME	ROOM	MICROFILM#	ATTNY	DISP	DATE	JUDGE
11	A		B				C			D		
E Form Number Requested F												
10	NOH	7042003			7182003	1100	A					25275
NOTICE OF HEARING												
9	ORD	3252003										25275
ORDER												

NXT TRAN P SCH TYPE ADD CASE NBR 00895019 REC NBR
 F2=Nxt Tran F3=Exit F4=Prompt F8=Juvenile F9=Name Lookup F13=Notes F16=Inv/Date

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- A - Code - Enter the code for this event. Prompt <F4> for a list of valid codes.
- B - Party - Enter the party number that this event is associated with. Prompt <F4> for a list of parties.
- C - Room - Enter the courtroom number that the hearing will be held in. Prompt <F4> for a list of courtrooms.
- D - Disposition - Enter the disposition code for this event. Prompt <F4> for a list of codes.
- E - Comments - Enter comments for this event. If left blank, the system will enter code description.
- F - Form Number - Enter the form number that you are creating. Prompt <F4> for a list of forms.

Probate Summary Screen

The summary screen combines the header, party and schedule screens into one display or print out. To display this screen. From the next tran line, enter SUM/INQ along with the case number and suffix number and press <Enter>. The system will display the following screen.

The screenshot displays a terminal window titled 'B' with a summary screen for a public case. The header section includes fields for CASE#, TYPE, XREF #, JUDGE, and DATE. The party section includes fields for NAME, SSNO, ADDRESS, CITY, STATE, ZIP, PHONE, STATUS, REOPEN, ATTN, and PUBLIC. The schedule section includes fields for MICRO, DISPO, CODE, ORIG PR, CSE TYPE, CHG, FROM TYPE, CHG VENUE, RACE, and ANCILLARY. The schedule table lists events with columns for NUM, DESC, QUALIFICATION, DUE DATE, PARTY ACTIVITY, COURT ACTIVITY, and SURETY. The footer section includes fields for NXT TRAN, SUM, TYPE, INQ, CASE NBR, REC NBR, and a list of function keys (F3-F16). The status bar at the bottom shows the user 'b' and the date '22/014'.

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SUMMARY      PUBLIC
CASE# 00895019 TYPE GA XREF #      TYPE      JUDGE 25275 DATE 1/01/2002
NAME  SOCIAL SECURITY,, SSNO 333445555 OPTIONAL DATE
ADDRESS
CITY      STATE      ZIP      PHONE
STATUS 0 CLOSED      REOPEN      ATTN      PUBLIC P
MICRO      DISPO      CODE      ORIG PR
CSE TYPE CHG      FROM TYPE      CHG VENUE      RACE      ANCILLARY
=====
NUM  DESC  QUALIFICATION  DUE DATE  PARTY ACTIVITY  COURT ACTIVITY  SURETY
1   GDA   AOT 11/19/2002  11/19/2002
      THIS IS A TEST,,

-----
NUM CODE  F/DATE  SEQ  H/DATE  TIME MICROFILM#  ATTN  DISP  DATE  JUDGE
2   NOH   2/15/2002    5/12/2002 1300      25275
NOTICE OF HEARING
3   AOT   11/19/2002      25275
GDA ACCEPTANCE OF TRUST/APPOIN

NXT TRAN P SUM TYPE INQ CASE NBR 00895019 REC NBR
F3=Exit F6=System F8=Juvenile F9=Name Lookup F13=Notes F14=Dockets F16=Inv/Date
Help
MA b 22/014
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The summary screen is divided into three main sections.

HEADER - The system will display key information from the header screen on the top of the summary screen.

PARTY - All parties will be displayed in party number sequence.

SCHEDULE - All event records will be displayed in date sequence.

Use the <Page Up> and <Page Down> keys to navigate through the pages.

Civil Quick Reference Guide

The Civil quick reference guide will give information about the following screens:

~Civil Header Screen~

This screen is used to record information about the plaintiff and defendant that the case is for.

~Civil Party Screen~

This screen is used to record information about the parties associated with the case.

~Civil Schedule Screen~

This screen is used to record information about the activities which occur in connection with this case.

~Civil Summary Screen~

This screen summarizes the header, party and schedule screen for the case.

Civil Transaction Request Screen

The transaction request screen is the main menu for the JIS probate court system. It allows you to access the screens you will use to enter data or inquire on data already in the system.

USER: C44ANGIE TRANSACTION REQUEST SCREEN RELEASE: 05/2003

Probate Transactions	Receivable Transactions	Vendor Transactions
HDR - Case Header	ARM - Master Inquire	APO - Other Vendor Maint.
PTY - Party	ARU - Master Maintenance	APA - Attny Vendor Maint.
SCH - Schedule	CHK - Master Payment Inq	APF - Facil Vendor Maint.
SUM - Summary	LUP - Receipt Inquiry/Void	APV - Voucher Processing
MED - Mediation	ARP - Receive Payments	API - Voucher Inquiry
FRD - Financial Order	ADJ - Adjustment	APP - Voucher Payments
DOC - Documents	CRM - Credit Memo	APJ - Voucher Adjustments
		Accounting Transactions
		ACT - Account Maintenance
		BMT - Budget Maintenance
		BIQ - Budget Inquiry
		PRM - Price File Maint.
	Adoption Transactions	Other Options
Reports	ADC - Adoption Case Header	REL - Release Information
RPT/PRO - Probate	ADP - Adoption Party	CNI - Central Name Index
RPT/FIN - Financial	ADE - Adoption Event	CPI - Cir/Pro Name Index
RPT/ADP - Adoption	ADS - Adoption Case Summary	CCL - Central Calendar
	ADF - Adoption Forms	

NXT TRAN **C** TYPE CASE NBR REC NBR

F3=Exit F5=Setup F6=System Commands F8=Juvenile F9=Name Lookup

F10=Name Update F14=Docket Request F16=Inv/Date F20=File Maintenance **Help**

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Enter "C" on the Next Tran line and press <Enter>. The system will switch to the civil system.

Civil Header Screen

The case screen holds information about the plaintiff and defendant.

HEADER ADD
 CIVIL# 03001030 TYPE A CASE# B TYPE B JUDGE DATE
 MICROFILM # STATUS C CLOSED D REOPEN E PUBLIC F
 DISPO G CODE G

PLAINTIFF
 ALT NAME TYPE
 ADDRESS
 CITY ST ZIP
 ATTORNEY

DEFENDANT
 ALT NAME TYPE
 ADDRESS
 CITY ST ZIP
 ATTORNEY

BOND AMOUNT TYPE
 LAST ACTION H DATE NEXT ACTION I DATE

NXT TRAN C TYPE CASE NBR 03001030 REC NBR
 F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
 F13=Notes F14=Docket Inq

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- A - Case Type - Press <F4> for a list of valid codes or refer to Table 8.
- B - XRef and Type- This is used to cross reference this case with a probate case, enter the case number and type of the probate case.
- C - Status - Enter the status of this case, O- Open, C = Closed, M = Mediation, U = Under Advisement.
- D - Closed - Enter the date this case closed. The case can't be closed if parties active.
- E - Reopen - Enter the date the case was reopened. The status must be "O" when reopening.
- F - Public - Enter the public status for this case. Press <F4> for a list of valid types.
- G - Dispo and Code - Enter the dispo date and code for this case. Press <F4> for a list of codes.
- H - Last Action - Displayed is the last action of this case.
- I - Next Action - Displayed is the next action of this case.

Civil Party Screen

The party screen holds information about the plaintiff, defendant and any other parties of this case.

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PARTY ADD
CIVIL# 04000500 TYPE CZ CASE# 03000888 TYPE DE JUDGE 21169 DATE 6/01/2003
TITLE CIVIL, PLAINTIFF, VS ESTATE OF DECEASED,,
MICROFILM # STATUS 0 CLOSED REOPEN PUBLIC P
DISPO CODE
=====
# 3 DESC A COMPLAINT FILED SAC DATE 6012003
SUMMONS EXPIRES EXP DATE 8312003
DATE SERVED SVD DATE B
DATE ANSWERED ANS DATE C
DISPOSITION CODE D DATE D
MICROFILM#

NAME
ALT NAME TYPE
ADDRESS

CITY ST ZIP
ATTNY

NXT TRAN C PTY TYPE ADD CASE NBR 04000500 REC NBR
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup
F13=Notes F14=Docket Inq
Help

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1902 - Session successfully started \\SCAO\1N54QL5 on Ne05:

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- A - Description - Press <F4> for a list of valid descriptions.
- B - Date Served- Enter the date the summons was served on this party.
- C - Date Answered - Enter the date this party answered the summons.
- D - Disposition - Enter the disposition code and date for this party.

Civil Schedule Screen

The schedule screen holds information about the activities of this case.

SCHEDULE ADD

CIVIL# 03001031 TYPE CZ CASE# 00000000 TYPE JUDGE 19081 DATE 1/01/2003

TITLE TEST PLAINTIFF, VS TEST DEFENDANT,

MICROFILM # STATUS 0 CLOSED REOPEN PUBLIC P

DISPO CODE

NUM	CODE	DATE	PARTY	ATTN	DISP	JUDGE	MICROFILM#
3	A		B		C		

D

NEXT ACTION:

DATE	TIME	SEQ	TYPE	COURTROOM	COMMENT
E	E	E	E	E	E

COURT ORDERED PAYMENTS \$ F

NXT TRAN C SCH TYPE ADD CASE NBR 03001031 REC NBR

F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup

F13=Notes F14=Docket Inq F16=Inv/Date

Help

MP b 08/008

1902 - Session successfully started \\SCAO\IN54QLS on Ne05:

- A - Code - Press <F4> for a list of valid codes.
- B - Party- Enter the party that this event is associated with. Enter "99" to associate with all parties.
- C - Disposition - Enter the disposition code for this event. Prompt <F4> for a list of codes.
- D - Comment - Enter comments associated with this event. If left blank, the system will enter the code description.
- E - Next Hearing - Enter the next hearing information.
- D - Crt Ordered Pmnt - Enter the amount of court ordered payments associated with this event.

Civil Mediation Screen

The schedule screen holds information about the activities of this case.

MEDIATION ADD
 CIVIL# 03001031 TYPE CZ CASE# 00000000 TYPE JUDGE 19081 DATE 1/01/2003
 TITLE TEST PLAINTIFF,, VS TEST DEFENDANT,,
 MICROFILM # STATUS 0 CLOSED REOPEN PUBLIC P
 DISPO CODE
 =====
 MEDIATION ORDERED A MEDIATION NOTICE SENT B
 HEARING DATE C TIME C LOCATION C
 =====
 MEDIATION PANEL:
 #1 D #2 D #3 D
 =====

PARTY # DESC	NAME	ATTNY	FEE/AMT PAID	BRIEFS FILED	SERVICE DATE	ACC/REJ
1 PLA	TEST PLAINTIFF,,	E	F	G	H	I
2 DEF	TEST DEFENDANT,,					

 =====
 NXT TRAN C MED TYPE ADD CASE NBR 03001031 REC NBR
 F3=Exit F6=System F8=Juvenile F9=Name Lookup F13=Notes
 F14=Dockets
 =====
 07/020
 1902 - Session successfully started \\SCAO\IN54QLS on Ne05:

- A - Mediation Order - Enter the date mediation was ordered.
- B - Mediation Sent- Enter the date the mediation notice was sent.
- C - Hearing Info - Enter the next hearing information.
- D - Mediation Panel- Enter the panel members bar codes. Prompt <F4> for a list of attorneys.
- E - Attny- Enter the attorney for this party.
- F - Fee/Amt Paid - Enter the amount paid by this party.
- G - Briefs Filed - Enter the date this party filed their briefs.
- H - Service Date - Enter the service date.
- I - Acc/Rej - Enter if accepted or rejected by this party.